Barron Fitz-Gerald

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Today's retirees are facing obstacles unlike any other generation before. Wellington Adams Financial Group thoroughly understands these challenges and wants to help those looking to reach their retirement goals overcome them. Preservation of wealth and tax reduction though sound financial strategies are the core beliefs of this independent financial planning firm's founders, Barron Fitz-Gerald and Simon Hilliard.

"Our clients want more than just the same old product sale or 'stay where you are and it'll come back' mentality," says Barron, a Financial Planner and Certified Estate Advisor. "We help our clients realize their financial dreams by taking the time to understand their unique needs," he continues, "Then we create customized, sound solutions through an open and transparent process."

Barron and Simon are not only advisors to their clients, but they're financial educators, too. "We want to empower our clients to safely navigate today's complex financial world," explains Simon, Financial Advisor and Investment Advisor Representative, "Educating clients is imperative to them understanding and being confident in the future success of their own financial or retirement plan."

There are typically two ways to obtain financial advice: one is given by registered representatives or brokers and the other is given by Investment Advisors. Many clients aren't aware of the main difference between the two, one of which is that investment advisors, like Simon, have a fiduciary duty to act in the best interests of their clients at all times. This fiduciary responsibility is reflected in the execution of their mission of providing the families and businesses they serve with innovative financial strategies, solutions, and planning that promote financial clarity, security, and overall quality of life.

In addition to financial planning and investment management, Wellington Adams also specializes in tax planning. "We offer proactive strategies on tax reduction strategies based on income and expenses, asset types, individual needs, and goals," Simon adds. "This allows our clients the opportunity to minimize their taxable burdens and build a solid foundation that can result in years of savings." They've aligned the company with strategic partners both locally and nationally with groups like Lenker & Associates and Gradient Tax, LLC. Throughout the year, these firms monitor tax law changes that could affect clients, recommend tax savings strategies and serves as an advocate in tax matters. "Our client's tax returns are prepared so they only pay what they are required to pay and not a penny more," explains Barron.

Wellington Adams has helped restore financial confidence and peace of mind for numerous individuals, families and businesses throughout the South Central Pennsylvania region. Through financial and retirement services as well as third party asset management, the firm has helped its clients become optimistic about their financial futures again and welcomes their referrals and other new clients.

Are you worried about your financial future or have a friend or family member who is? Let us help!

Simply call 717.793.2409 or go online to schedule your complimentary, no-obligation risk assessment today. You'll receive a third-party analysis of your current investments, personalized income projections as well as some ideas you can implement immediately to help ease your financial concerns.

Advisory services offered through Gradient Advisors, LLC.
Wellington Adams associates are all members of the National Ethics Association – you can check on the sound personal standing of their unblemished records and licenses at www.ethcs.net or call 800.282.1831.

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